
STARS MANUAL.....	1
PROJECT-27 FORM INSTRUCTIONS	1
INTRODUCTION	1
PROJECT-27 FORM INSTRUCTIONS.....	1

STARS MANUAL

PROJECT-27 FORM INSTRUCTIONS

INTRODUCTION

To aid in the Project Control Table Maintenance process, the Project-27 form is similar to the Project Control Table Maintenance Screen (S027). To set up a Project, you should use the [PROJECT-27](#) form.

PROJECT-27 FORM INSTRUCTIONS

Many of the agencies enter their own Projects instead of submitting them to the State Controller's Office for data entry. However, when those agencies accept that responsibility, they also accept the responsibility for fixing any problems that may arise due to data entry errors.

Use the following instructions as if you are an agency that enters your own Projects. These are the same instructions used by the State Controller's Office. (Some Data Elements below are described as Control Key, Information Elements, etc. These descriptions do not appear on the form.)

Data Element	Description
AGENCY NAME	Enter your agency name
AGENCY CODE	Enter your three-digit agency code.
PROJECT-NUMBER PROJECT PHASE	Enter the six-character Project Number and the two-alphanumeric character Project Phase. If you are not dividing the project into phases, enter zeros (00) in this Project Phase field.

INFORMATION ELEMENTS – Lookup elements used to reduce coding on project-related transactions. Start and End Dates are included to open and close the project for posting financial transactions:

Data Element	Description
VENDOR NUMBER/SFX	If the project type is '6' (subgrantee), enter the nine-digit Vendor Number and two-digit Vendor Number SFX of the subgrantee. Otherwise, it must be blank. See the PRJ TYPE below.
VEND-FYE-MO	If the project type is '6' (subgrantee), enter the two-digit Vendor Fiscal Year End Month showing when the subgrantee's fiscal year ends. If this is not a subgrantee, this field must be blank.
DESCRIPTION	Enter the Project Description, up to forty-characters.
PROJECT TYPE	<p>Enter the one-digit Project Type that identifies the record as being a Project or Work Authorization.</p> <p>1 – Other Project – Use for projects not otherwise classified below.</p> <p>2 – Capital Project – Use for capital projects.</p> <p>3 – Work Authorization To Be Billed By Task – Use for jobs billed to another agency or billed to another project within the same agency. Billable budgets are restricted to Phase level only.</p> <p>4 – Work Authorization – Use for jobs billed to another agency or billed to another project within the same agency. If billed, you would normally generate one charge transaction and multiple recovery transactions.</p> <p>5 – External Project – Use for projects performed on behalf of an external organization. If billed, you would have one charge and multiple recovery transactions reported but not automatically posted.</p> <p>6 – Subgrantee – Use for subgrantee projects. The above VENDOR NUMBER and VEND-FYE-MO must be input, as well as the following CATALOG NO.</p>
START DATE	Enter the six-digit Project Start Date (MMDDYY) or leave blank. If entered, this date identifies the effective start date for posting to the project. You cannot make postings to this project before the effective start date. If you do not enter a start date, postings can begin at any time.

Data Element	Description
END DATE	Enter the six-digit Project End Date (MMDDYY) or leave blank. If entered, this date identifies the effective end date for posting to the project. You cannot make postings to this project after the effective end date. If you do not enter an end date, you can make postings at any time.
LOOK-UP GRANT NUMBER/ LOOKUP GRANT PHASE	Enter the six-character Lookup Grant Number and the two-alphanumeric character Lookup Grant Phase or leave both fields blank. STARS uses the Lookup Grant Number/Phase to associate a Grant/Phase with the Project/Phase defined in the Project Control Table. When you post transactions to the Project records, STARS simultaneously posts the Grant with the same transaction information. You must have the grant set up on your agency's Grant Control (29) Table before you can enter this lookup.

For the next group of data elements (or indicators for Posting Levels and Control types), it is important to understand the implications before you enter them. Be sure you understand how to make adjustments if you incorrectly enter or change the elements.

WARNING: The following factors will influence decisions about which level expenditure and revenue object post level indicator to use.

- Once you enter these indicators, you should not change them, even at year-end, since projects are not restricted to fiscal years. If you need to make a change, we recommend that you make the change on the Project for the new project year.
- The level on the Project Control Table will be the level displayed on the "online" Project File Inquiry screens (80 and 81).
- If a high degree of detail is required for reporting purposes, then this indicator must reflect that degree of detail. Reports can be produced which give information at more summarized levels, but reports cannot be ordered for a lower level of detail than is posted to the file. This level should be the lowest level of detail that you may want on your reports and online.

Data Element	Description
(EXP) OBJECT POST LEVEL	<p>Enter the one-character Expenditure Object Posting Level indicator that determines the Expenditure Object level that STARS will post transactions to the Project File and if it posts with a Fund.</p> <p>FUND- OBJECT LEVEL</p> <p>0 – No FUND No Exp Object</p> <p>1 – No FUND EXP OBJECT level</p> <p>2 – No FUND EXP SUMMARY OBJECT level</p> <p>3 – No FUND EXP SUBOBJECT level</p> <p>4 – No FUND EXP SUBOBJECT DETAIL level</p> <p>-OR-</p> <p>A – FUND No Exp Object</p> <p>B – FUND EXP OBJECT level</p> <p>C – FUND EXP SUMMARY OBJECT level</p> <p>D – FUND EXP SUBOBJECT level</p> <p>E – FUND EXP SUBOBJECT DETAIL level</p> <p>Note: You must post your Project budgets at this level if you are using fatal controls. When budgets are not used, this indicator should be set at the lowest level desired for reporting and on-line inquiry.</p>
REVENUE POST LEVEL	<p>Enter the one-digit Revenue Object Posting Level indicator that identifies the level of Revenue Object that STARS will post a Project in the Project File. The types of indicators are as follows:</p> <p>OBJECT LEVEL</p> <p>0 – No Rev Object</p> <p>1 – REV OBJECT level</p> <p>2 – REV SUMMARY OBJECT level</p> <p>3 – REV SUBOBJECT level</p> <p>4 – REV SUBOBJECT DETAIL level</p>

Data Element	Description
BUDGET CONTROL TYPE (The warnings for Posting Levels and Control types do not apply to this data element)	<p>Enter the one-digit Budget Control Type indicator. Identifies whether STARS will control the Project Expendable Budget Control on a fatal or warning basis, if at all. Values are as follows:</p> <p>0 – NONE - No Control. All transactions will post and STARS will issue no error messages. You can make postings in excess of the project budget.</p> <p>1 – FATAL - Fatal Control. Expenditures over the project budget will not post and STARS will issue a fatal error message. You must enter a large enough project expendable budget to allow an expenditure transaction to post against the project.</p> <p>2 – WARNING - Warning Control. Expenditures over the project budget will post and STARS will issue a warning error message. To avoid constant generation of warning messages, you should input adequate expendable budgets. See the Budgeting chapter for more information. NOTE: You can change the budget control type without problems to the reporting or on-line screens. Enter budgets into STARS through the standard data entry process</p>

The following data elements are Information Elements - lookup elements used to reduce coding on transactions:

CATALOG NO	Enter the eight-character Catalog (CFDA) Number or leave blank. You should use catalog numbers on all Federal grants, especially for the subgrantee project type.
PURGE IND (PI)	<p>Enter the one-character Purge Indicator.</p> <p>N – Project not ready for purge. Use for new project setups.</p> <p>Y – Project closed, ready for purge. The GL file is not involved</p>
PROJECT MANAGER	Enter the name of the Project Manager up to forty characters or leave blank. Identifies the project manager or other optional information.
ORC	Enter the four-digit Organization Reporting Category or leave blank. Provides a statewide code that may be used for accumulating project information across agencies. Most agencies would not use this unless instructed by another agency needing to accumulate this information across agencies.

BILLING INFORMATION – These elements define if, how, and when the project will be billed.

METHOD	The one-digit Billing Method indicator. The default is: 0 – Project not billed This cannot be changed
CYCLE	The one-digit Billing Cycle indicator. The default is: 0 - Project not billed This cannot be changed